visit California

Regional strategic tourism plan

Central Valley

JLL SEE A BRIGHTER WAY

June 2025

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The majority of the grant funds were used to directly support tourism recovery through marketing initiatives. With the EDA's oversight, a portion of the grant was directed to the development of these plans, which are designed to build a more resilient travel and tourism sector in California. While the one-time nature of the grant does not provide funding for ongoing implementation, the plans identify existing resources that can be leveraged at the state and regional level.

Visit California extends its gratitude to the diverse project teams, strategic partners and industry experts whose contributions were instrumental throughout the two-year process

Fresno Chaffee Zoo, Fresno

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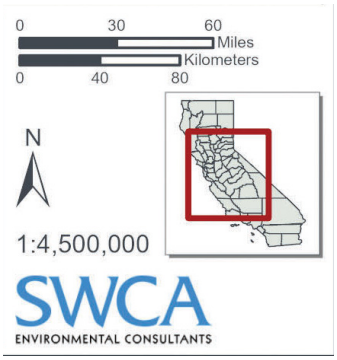
Executive summary

The Central Valley is a geographically large region, spanning 14 counties located in the center of the state of California. Given the large geographic makeup, the region is uniquely diverse in landscape and visitor demographics. The region is commonly known as the home to numerous agriculture companies, farms, food production factories and logistics businesses. The tourism industry is smaller as compared to agriculture, oil and gas or logistics in the region, but positioned well for growth. In 2023, the Central Valley region reported total travel spending of $8.2 billion, marking a 0.2% growth rate from the previous year, according to "The Economic Impact of Travel" report by Dean Runyan Associates in 2023.



County Region Major Road

To develop a comprehensive regional tourism strategy, Jones Lang LaSalle (JLL) and Visit California embarked on an extensive two-year planning initiative. This effort aimed to enhance, harmonize and validate existing destination plans while examining tourism priorities and opportunities from a regional perspective. The approach included a thorough review of existing plans, such as the **City of Fairfield General Plan** and **City of Suisun City 2035 General Plan**, among others. Broad stakeholder engagement was conducted through various methods, including Regional Advisory Committee meetings, tourism stakeholder surveys with 38 participants, focus groups, individual interviews with more than 75 industry stakeholders and site visits to more than 70 points of interest. Additionally, in-depth regional research and discovery was carried out to inform strategy development. This comprehensive approach not only provided valuable insights but also emphasized the importance of regional collaboration across the Central Valley region, seeking to complement local strategies while identifying overarching priorities and opportunities to strengthen the region's tourism sector.

The research process utilized several proprietary tools and methodologies. The Tourism Readiness Index, developed in collaboration with the World Travel & Tourism Council, analyzed nearly 4,000 tourism-related data points across 68 indicators. The region is classified as an "emerging performer" destination, indicating that the region and its destinations are gaining momentum and experiencing a noticeable increase in tourism. However, results indicated that the Central Valley is lower than California state averages in seven out eight of the **index pillars**, and is in line the state average for urban readiness.

The **demand driver scorecard** process evaluated 108 attractions and experiences in the Central Valley region. The scoring and analysis supported the identification of key priorities and the formulation of strategies to position the Central Valley for sustainable success. For example, at the moment, the Central Valley has limited large-scale attractions with no demand drivers that have an international or national draw. The majority of the demand drivers in the Central Valley region are either targeted regional draws or "must see if in the area" attractions. Over 20% of the scored attractions were recognized as outdoor recreation assets, including the gardens, trails, state parks and agricultural tours throughout the region. The region also offers a variety of shopping and retail attractions, such as the Solano Town Center, Fashion Fair Mall and the Outlets at Tejon.

The **event matrix** process assessed 26 events across the region, such as the Fresno County Blossom Festival, Kern County Fair, World Agriculture Expo and the Lodi Grape Festival. The results of the event matrix indicate stakeholders should focus resources on greater development or promotion of events that can attract national and international interest, which will drive overnight visitation and substantial economic impact to the region.

Jelly Belly Factory, Fairfield

Based on these analyses and stakeholder input, several strategic priorities were identified for the Central Valley:

1. Invest in tourism product development: enhance and promote tourism offerings to drive additional overnight visitation, including the further development of agritourism opportunities and events.
2. Improve tourism-related transportation infrastructure: prioritize public transportation enhancement and expansion opportunities at Fresno Yosemite International Airport.
3. Enhance regional marketing and messaging: develop cohesive, regionwide branding (ideally focused on agritourism) to promote tourism to the region.

These opportunities align with state goals of sustainable tourism development, economic growth and enhancing visitor experiences while preserving natural and cultural resources. Implementation will require ongoing engagement with stakeholders, including DMOs, local businesses and community organizations.

In conclusion, the Central Valley has the capabilities to build upon the current momentum to create a strong tourism economy and capitalize on opportunities including agritourism, natural and outdoor recreational attractions, and arts and culture. The Regional Strategic Tourism Plan emphasizes the importance of balancing tourism growth with stakeholder and community needs. Ongoing focus among local tourism stakeholders will be crucial in implementing these strategies and ensuring the sustainable development of the region's tourism industry.

JLL and Visit California would like to thank the Central Valley Regional Advisory Committee who played a crucial role in this planning process. Their time, expertise, insights and valuable contributions throughout the process were instrumental in shaping this strategic plan. Their continued involvement and communication will be helpful in supporting implementation approaches to the strategic opportunities and ensuring the long-term success of tourism in the Central Valley. Please refer to the committee participants in the **Appendix**.

Oak Farm Vineyards, Lodi

Regional research and discovery

To ensure a comprehensive approach to this plan, the Central Valley Regional Strategic Tourism Plan integrates insights from stakeholder engagement and regional research and discovery to develop a clear vision and strategy. Throughout two years of the planning process, extensive regional research and discovery was conducted to gain an in-depth understanding of the current state of the tourism industry and identify potential areas for growth. JLL leveraged both proprietary strategic planning tools, extensive stakeholder feedback and research previously conducted by Visit California to better understand each region. Many of the insights from these findings have been critical to the foundational strategies in this plan.

The Annex Kitchen, Fresno

The Regional Research and Discovery section includes vast research which has been detailed further and organized under the following categories.

JLL-conducted research components:

1. **State of the region overview: the overview provides a brief introductory summary of what currently impacts the tourism industry in the Central Valley.**
2. **Destination plans review database: data-gathering process included 82 individual plans inventoried; elements include addressing housing, employment, guiding development and preserving existing neighborhoods, protecting the environment, improving pedestrian experience and walkability, and preserving agricultural lands.**
3. **Stakeholder engagement: this section incorporates feedback from multiple different methods outlined here:**
   - Regional advisory committees: meetings held monthly for approximately 16 consecutive months with a committee consisting of 25-plus members. Please refer to the **Appendix** for a full list of members.
   - Tourism stakeholder survey: 38 participants representing a diverse range of individuals and organizations involved in the tourism sector. The feedback summary highlights perspectives on strengths, weaknesses and growth opportunities.
   - Focus group feedback: in a small group environment, six in-depth discussions with stakeholders were conducted from different sectors, including hotels and lodging; restaurants; retail; outdoor recreation; events; attractions; economic development and agritourism. Through these discussions, valuable insights were gathered on specific areas of interest and growth potential.
   - Individual interviews feedback: over 75 key industry stakeholders interviewed, offering a deeper understanding of perspectives and addressing any specific questions or concerns.
   - Site visits: visited 70-plus points of interest throughout the Central Valley, providing valuable insights and observations.
4. **Tourism readiness index: detailed data analysis process which used nearly 4,000 data points to assess the readiness and capacity of the tourism industry in the Central Valley.**
5. **Demand driver scorecard: evaluation which identified the key assets and experiences driving visitor demand in the region.**
6. **Event matrix: evaluation which identified key events driving visitor demand in the region.**

Visit California provided research, JLL reviewed components:

7. **The Economic Impact of Travel (Dean Runyan Associates, 2023)**
8. **Visit California Community Sentiment Study (Future Partners, 2023)**

A comprehensive research approach allowed for the development of a clear vision and strategy for the Central Valley's tourism industry, with foundational strategies that are rooted in data, insights and feedback from stakeholders.

State of the region

The Central Valley is a geographically large region, spanning 14 counties located in the center of the state of California. Given the large geographic makeup, the region is uniquely diverse in landscape and visitor demographics.

The region is commonly known as the home to numerous agriculture companies, farms, food production factories and logistics businesses.

With regards to the state of the region's tourism industry, the Central Valley has several destination marketing organizations, located in the major cities/metro areas of the region and funded by each respective location. Generally, all DMOs and key tourism stakeholders share similar goals in attracting more visitors to the region. In some respects, each area within the Central Valley may have its own unique set of priorities, nuances and funding capacities, which may make a unified approach to promoting tourism and development of a cohesive marketing strategy complex.

The attractions of the Central Valley have traditionally resonated with local and regional audiences. To bolster the tourism economy, there is a need to increase the quantity and quality of attractions/demand drivers and broaden the appeal to visitors from beyond the region. While small-scale agritourism attractions currently exist in the region, there is ample opportunity for agritourism attraction development and growth in the Central Valley given the region produces approximately 25% of the nation's food supply. By expanding and capitalizing on agricultural tourism, the Central Valley has the potential to become a leading agritourism destination in the country, if not the world.

The existing tourism infrastructure caters primarily to transient business travel and smaller groups and conventions. The development of more leisure-based tourism attractions and full-service/upper upscale hotels in the region would serve to entice a broader visitor base to include more transient leisure travelers. The Central Valley's limited selection of full-service and upper upscale hotels is also a barrier to hosting larger and higher-spend conventions and groups. Furthermore, air accessibility in the southern part of the region (e.g., the Kern County area) is limited, and public transportation options are minimal for visitors traveling between California's gateway cities and the Central Valley, as well as within the region itself.

Tule River, Porterville

Events in the Central Valley typically are smaller in scale, drawing attendees from nearby areas within the region itself. The expansion of events is an opportunity for the region, particularly in agricultural-related events that would appeal to visitors outside the local area. Metro area funding constraints, local resident sentiment and policy prioritization of other industries aside from tourism may limit the growth in event planning resources. Moreover, the scarcity of hotel inventory in certain areas throughout the region can impact the types of events that can be hosted and also attendance capacities.

Despite challenges, the Central Valley is positioned well for growth. Through strategic investments in tourism product development, amplified marketing efforts and collaborative community involvement/engagement, the tourism industry can continue to grow and define itself as a destination that celebrates its agricultural roots while welcoming visitors from around the world.

L'Apero les Trois, Winters

Destination plans review database

The Regional Strategic Tourism Planning process was designed to examine issues from a regional perspective, building upon the valuable work already completed in destination-specific plans by DMOs, convention and visitor bureaus and municipalities. This approach ensures that existing efforts are leveraged and enhanced rather than duplicated.

The comprehensive review encompassed 500 plans across California, with 82 plans specifically focused on the Central Valley region. A full list of the reviewed plans can be found in the **Appendix**.

Upon analysis of the Central Valley plans, several key themes were identified that align with the priorities highlighted in the present plan.

1 Sustainable economic development:

- Entrepreneurship and small businesses
- Technology and green jobs
- Training and skill development aligned with local job opportunities

2 Land use and community design:

- Development that enhances community identity
- Quality of life improvements
- Historic preservation

3 Transportation and mobility:

- Bike and pedestrian networks connecting residential areas to commercial and recreational spaces
- Public transit options to improve accessibility and reduce reliance on single-occupancy vehicles

4 Environmental conservation and resilience:

- Conservation programs to protect local ecosystems and promote biodiversity within urban areas
- Green infrastructure solutions
- Community education initiatives on sustainability practices

5 Public safety and health:

- Emergency response plans that address potential natural disasters and public health crises
- Design of public facilities to promote health and wellness for all residents

Working in conjunction with the regional advisory committee and armed with insights from the existing plans, the approach sought to examine regional issues holistically. This methodology was further validated through the engagement process. It is crucial to consider this regional plan in the context of destination-specific plans, recognizing that it does not aim to reinvent existing strategies. Instead, the regional plan serves to complement and align with these destination plans, while simultaneously reinforcing the significance of regional cooperation and engagement.

Stakeholder engagement

Stakeholder input was collected through multiple methods (outlined below in detail), including regional advisory committee discussion forums, a series of topical focus groups, a comprehensive tourism survey, a thorough site visit, and individual meetings with tourism stakeholders, industry leaders and related entities.

Regional advisory committees

Regional advisory committees were monthly gatherings composed of industry leaders within tourism, economic development, lodging, attractions, retail, entertainment, transportation, workforce and more. Meetings were held monthly for approximately 16 consecutive months. The committee consisted of 25-plus members, of which a full list can be found in the **Appendix**.

Tourism stakeholder survey

Questions from the survey capture a variety of topics including travel preferences, satisfaction levels with accommodations, transportation, attractions, etc., suggestions for improvement and more. The tourism survey was conducted anonymously to encourage feedback and diverse perspectives from various sectors across the region, while asking overall demographics and industry profile questions to shed light on the represented stakeholder groups. This survey garnered 38 responses from across the Central Valley.

Focus groups

Focus groups were conducted to discuss key themes and gather qualitative insights. There were six focus groups with nearly 75 total participants, including DMO leaders; representatives from hotels and lodging; attractions and arts; restaurants; retail; agriculture; entertainment sectors and specialists in economic development; agritourism; transportation; workforce; infrastructure; meetings; events and conventions; diversity, equity and inclusion; and more.

Individual interviews

Individual meetings were held with stakeholders to collect detailed feedback. The stakeholders included industry leadership and management, supporters, and individuals concerned with tourism's potential challenges and impacts on the Central Valley. The interview process encompassed 75-plus individual interviews, including all members of the regional advisory committee.

Site visits

Site visits were conducted throughout the Central Valley to immerse further in the local environment, engage directly with stakeholders, visit tourism sites and attractions, and witness firsthand the dynamics of the tourism industry in the Central Valley. Over 70-plus points of interest were visited throughout the Central Valley.

The diverse set of perspectives ensured our study comprehensively captured both the benefits and potential drawbacks of tourism. All stakeholder feedback also provided key guidance and direction to become the basis of many strategies.

Key themes from stakeholder engagement

The various methods of stakeholder feedback reflected several major themes within the Central Valley region:

- The Central Valley's tourism industry is generally overshadowed by other internationally and nationally recognized tourism destinations in the Bay Area, High Sierra and Southern California regions.
- Agritourism is the opportunity to differentiate the Central Valley through the promotion and development of agricultural attractions. The region should leverage the presence of both major international agribusinesses and local family run farms to offer unique agritourism experiences to visitors.
- Elevate the Central Valley's wine producing regions by marketing its nationally known labels, family run vineyards and affordable price points to both national and international audiences. The Lodi and Suisun Valley areas have an opportunity to be positioned and messaged as approachable wine touring and tasting destinations.
- Investments into infrastructure and transportation such as more full-service hotels, additional convention/conference venues, public transit and high-speed rail need to be prioritized in order to grow visitation.
- There is a need for increased city and county government attention, policy support and subsidies for the tourism industry. Current city and county policy and subsidy focus is on the agriculture, oil and gas and logistics industries.
- Addressing larger statewide policy issues, such as visible homelessness, the impact of natural disasters and utility access for new developments, must be prioritized, all of which may affect the region's appeal to tourists.

The key themes identified above present a brief synopsis of the stakeholder conversations, focus group feedback, survey results and individual interviews. The themes supported the development of the priorities in this plan. The regional strategic planning process leveraged stakeholder feedback to validate research and direction for the future of the region. While this plan addresses many crucial aspects of tourism development, it is important to acknowledge that some identified issues fall outside the direct purview of the tourism industry and may require coordinated action from various levels of government and other sectors to effectively address.

Tourism readiness index

Overview

The first phase of the **regional research and discovery** involved an in-depth analysis of the Central Valley as a destination based on the tourism readiness **index**. The tourism readiness **index** is an analysis tool developed collaboratively by JLL and the World Travel & Tourism Council. The **index** offers destinations an opportunity to evaluate and comprehend their own tourism preparedness based on 68 essential data points that directly influence the tourism industry. The indicators evaluate the current state of the region's tourism industry and identify potential areas for future growth.

The assessment encompasses research of various aspects within a destination's landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements and more. With the insights provided by the tourism readiness **index**, destinations can gain a thorough understanding of growth readiness, enabling informed decisions and optimization of tourism strategies.

A comprehensive analysis was conducted on all 58 counties in California, examining 68 indicators. The process resulted in the collection and organization of nearly 4,000 data points, categorized according to regional boundaries. All sources included were vetted by JLL and WTTC.

The tourism readiness **index** analyzed data for each region in the following categories:

- **Scale:** The capacity of the destination's tourism infrastructure, considering its size and volume.
- **Concentration:** The tendency to attract leisure visitors who focus on specific key attractions and areas.
- **Leisure:** Evaluation of visitor spending, perceived attractiveness and specific attractions related to cultural and natural heritage sites and retail offerings.
- **Business:** The development of necessary infrastructure and products to support business travel.
- **Urban readiness:** Investments in enhancing connectivity within the destination to attract business opportunities, talent and visitors.
- **Safety and security:** The prioritization of safety and security within policies and practices.
- **Environmental readiness:** The prioritization of sustainability through reflected strategies, policies and destination positioning.
- **Policy:** The integration of tourism policy within the destination's broader agenda.

These eight categories each incorporate up to 15 data points grouped to create the pillars of tourism readiness. The data points in each pillar are weighted and scored. The outcomes from this analysis determine what features of the destination need to be prioritized to ensure long-term smart growth to positively impact the local economy through tourism's benefits. See **Appendix** for further detail on the tourism readiness index methodology.

Yogurt Mill, Modesto

The Central Valley region results

The tourism readiness **index** reveals that the Central Valley is lower than state averages in seven out of eight pillars, and in-line with the state average for urban readiness, highlighting fair performance. Notably, the Central Valley is lower when compared to the state regional average for scale, meaning the size and volume of the region's tourism infrastructure has room for improvement. However, the region is in line with the state regional average for urban readiness, indicating the region is currently investing into infrastructure, making the region more attractive to businesses, tourism workforce and visitors.

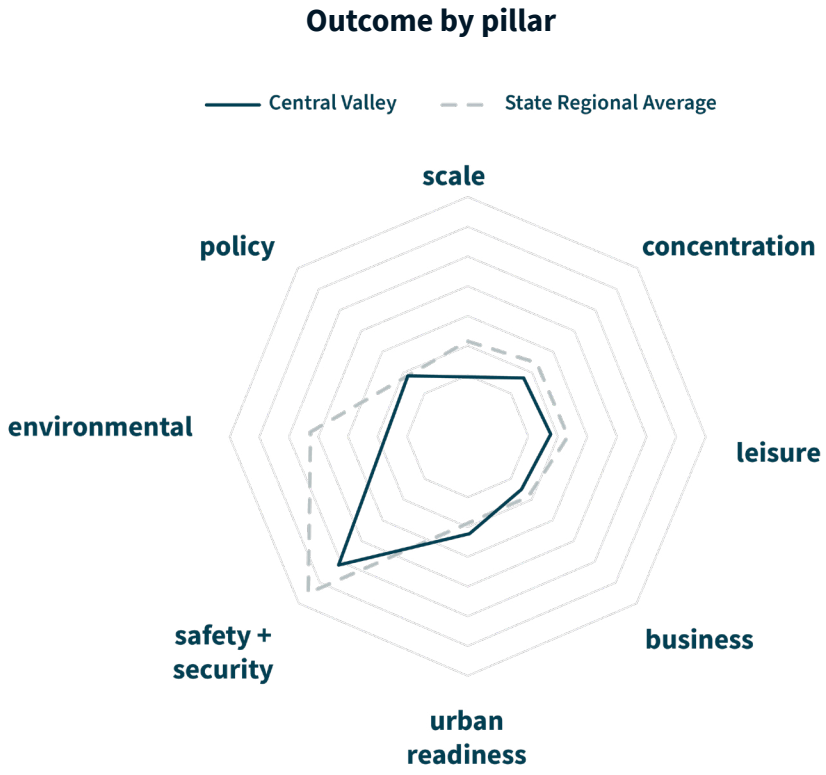
In-depth analysis of data from sources such as Destination Analysts, TripAdvisor and more shed light on the factors contributing to the Central Valley's tourism readiness performance. For instance, the analyzed data highlights urban readiness and policy as stronger points for the region, meaning there are investments into infrastructure and some local government policies supporting and driving tourism.

Conversely, certain areas of the readiness **index** note challenges such as limited luxury or high-end hotel offerings and limited public transit options. These insights provide opportunities for targeted improvements to enhance the Central Valley's overall tourism readiness and enhance its competitive edge.

Based on the results, the Central Valley region is classified as an "emerging performer." This typology refers to destinations that are gaining momentum and experiencing an increase in tourism. While such regions may be smaller in scale, they offer opportunities for strategic development initiatives.

As an emerging performer, the Central Valley should prioritize actively investing in additional infrastructure development to support the growing tourism demand. The region should capitalize on the rising momentum by further enhancing tourism offerings to attract a larger visitor base. However, as the region experiences growth, it may face pressures due to limited organizational structure. Balancing growth with sustainable development is crucial for the Central Valley to thrive as a destination.

Ongoing strategic planning, including regional research and discovery and targeting new visitor segments, will enable the Central Valley to maximize the utilization of its existing assets while identifying new growth opportunities. Finally, sustainable development practices should be prioritized to protect the natural environment, preserve culture and support local communities. Please refer to the **Appendix** for a more detailed overview of the tourism readiness index and all destination typologies.



Demand driver scorecard

Overview

The regional strategic planning process utilized JLL's proprietary demand driver scorecard to evaluate the impact of individual regional assets and experiences and future investment opportunities. The demand driver scorecard is designed to establish a baseline and identify investment prospects within the tourism sector. Strategic planners, investors and developers gain the ability to make informed decisions backed by robust data and analysis. The scorecard assists destinations in strategic planning and guides stakeholders in the formulation of targeted marketing to maximize returns.

This scoring process was based on an evaluation which included:

- **Multistep assessment:** Evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels, event opportunities, engaging visitor experience and more (further detail outlined in **Appendix**).
- **Categorization as attractions vs. attractors/demand generators:** Categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** Classifying each attraction into a category based on overall points score. Categories were little to no visitor interest (0-19), interesting to do on a repeat visit (20-39), "must see" if in the area (40-59), regional attractors (60-79), national attractors (80-95) and global attractors (96-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each demand driver:** Segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation and more. Assets could be assigned to multiple relevant categories.

Categorization of a region's demand drivers helps assess the visitor experience, assists in strategic planning, identifies areas for future development or revitalization projects, and enables the prioritization of enhancements to visitor-facing attractions. Overall, asset categorization provides a framework for a more organized and detailed analysis, aiding in regional research and discovery, planning and decision-making processes.

Fiscalini Cheese, Modesto

Fresno Chaffee Zoo, Fresno

The Central Valley region results

The Central Valley demand driver scorecard process assessed 108 attractions and experiences across the region, which were identified by regional advisory committee members, individual interviews, desktop research and by JLL during site visits. The scoring and analysis are a representative analysis intended to highlight the inventory and diversity of assets in the Central Valley.

Of the 108 assets that were measured, the Central Valley has limited large-scale attractions. The region has no demand drivers that have an international draw and three demand drivers with a national draw, including University of California, Davis, Fresno State and the Sequoia Shuttle. The majority of the demand drivers in the Central Valley region are either targeted regional draws or "must see if in the area" attractions. "Must see if in the area" attractions typically do not drive overnight visitation.

More than 20% of the Central Valley's attractions are recognized as outdoor recreation assets, including the gardens, trails, state parks and agricultural tours throughout the region. The region also offers a variety of shopping and retail attractions, such as the Solano Town Center, Fashion Fair Mall, and the Outlets at Tejon. Finally, the Central Valley boasts a variety of arts and culture offerings — including museums, galleries, theaters and historical sites — rounding out the region's portfolio of demand drivers. Scoring and analysis shows that the Central Valley's diverse mix of tourist attractions is a strength.

Guided by the findings from the demand driver scorecard, a rich mix of attractions, including nationally recognized ones, is crucial in attracting visitors to the area. While certainly unique and growing in scale, the Central Valley region currently has an average set of demand drivers as indicated by the majority of the offerings being assessed as targeted regional draws or "must see if in the area" attractions.

There is room to further promote the region's portfolio of agritourism offerings to a greater audience. By capitalizing on its heritage, the region can enhance its appeal to tourists looking for unique and engaging experiences that recognize the Central Valley's roots in farming. Emphasizing agritourism draws those in search of distinctive travel opportunities and can serve as a major differentiator and draw for the region. This focus is key to boosting the tourism sector's growth and longevity in the Central Valley and will be further discussed in the forthcoming strategies.

The demand driver scorecard findings have supported the identification of key priorities and the formulation of strategies to position the Central Valley for sustainable success.

Jelly Belly Factory, Fairfield

Event matrix

Overview

The event matrix process encompassed a thorough evaluation of existing annual leisure-facing events within each region. The assessment helps tourism stakeholders understand which events generated the most significant impact and, more specifically, what aspects of event planning could further enhance the event. Like the demand driver scorecard, JLL's event matrix product involves a dedicated analysis of individual events, charting their outcomes and impacts based on overall scores.

The iterative approach enables continual refinement and optimization as events are held each year. It empowers regions, DMOs and event organizers to stay ahead of market trends and make strategic adjustments to optimize event offerings, ensuring events remain competitive in the ever-changing landscape of the industry.

The event matrix process included:

- **Identifying significant events:** collaborated with regional advisory committee members and DMOs to inventory regionwide event master list.
- **Utilizing comprehensive criteria:** scoring each event based on 11 detailed criteria aligned with the broader tourism landscape, such as event infrastructure, planning, marketing and potential economic impact.
- **Categorizing events based on score:** categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** classifying each attraction into a category based on overall points score. Categories were community-based events (0-59), regional events (60-79), national events (80-95), and global events (96-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Evaluating critical mass:** assessing the overall volume and significance of current events, identifying need periods, gaps and opportunities.
- **Leveraging outcomes:** developing optimal calendar programming and identifying specific opportunities to enhance events.
- **Collaboration:** working closely with the regional advisory committee to review effective tactics, address study results and engage individual event organizers in the future.

This approach ensures a well-informed understanding of the event landscape and helps in positioning regions for success by focusing on high-impact events. See **Appendix** for further detail on the event matrix methodology.

Madera District Fair

The Central Valley region results

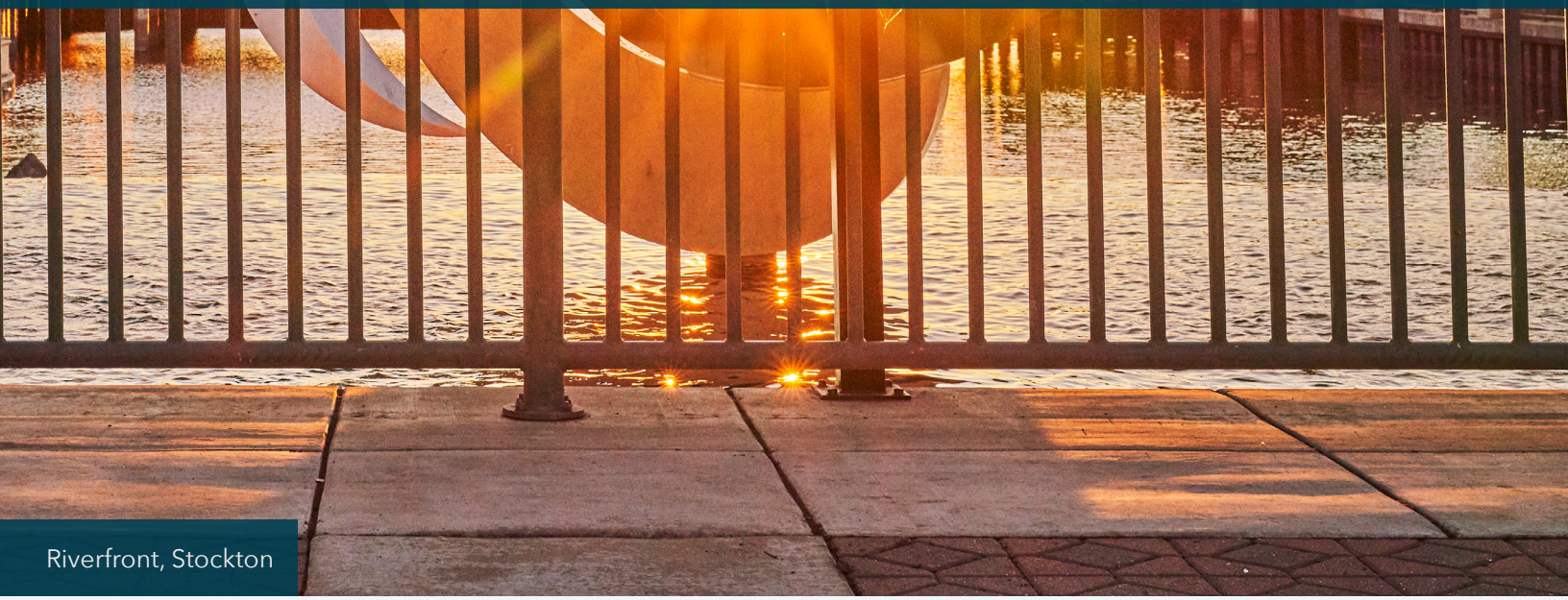
The Central Valley event matrix process inventoried and scored 26 events across the region that were collaboratively identified by the regional advisory committee during our visits to the region, noted as high priority in stakeholder surveys and validated as significant current and future room night generators during stakeholder discussions. Like its demand drivers, the Central Valley hosts an array of events, with a diversity of events across the region and throughout the year.

The outcomes from this analysis identified six unique events that are positioned to draw regional demand, including the Fresno County Blossom Trail, Kern County Fair, World Ag Expo in Tulare, Lodi Grape Festival, the Almond Blossom Cruise in Modesto and Woodland's Dinner on Main. These events currently drive overnight visitation and can enhance the destination's visibility, primarily locally. Hoteliers, retailers, restaurateurs and other regional representatives reinforced the notable annual economic impacts of these events.

Several additional events were analyzed, and the majority of the events were classified as "must see" if in the area-type events, including the Lodi Wine & Chocolate Festival, CandyPalooza at JellyBelly in Fairfield and Visalia's Taste the Arts Festival. While these events attract visitors, overall scores indicate these events draw visitors from the nearby area and contribute modest overnight visitation and economic impact as compared to other annual events in the region.

The results of the event matrix indicate stakeholders should focus resources on greater development or promotion of events that can attract national and international interest, which will drive overnight visitation and substantial economic impact to the region. Additionally, stakeholders highlighted the need for a centralized calendar of all events, with a desire to increase promotion and visibility of year-round event offerings to visitors. Further, the event matrix is recommended to be utilized on an ongoing basis as an objective approach to evaluating the event inventory at any given time to assess the impacts of current events in the region.

Additionally, it is highly recommended to supplement the utilization of the event matrix with external resources to support events with regional impact. Collaborating with local DMOs, economic development organizations and industry experts can provide valuable insights, data and expertise to further evaluate the potential economic benefits and overnight visitation drivers of current and future regional annual events. This collaborative approach, with the event matrix, ensures a comprehensive and well-informed decision-making process when assessing the impact of current events in the region.



Riverfront, Stockton

Key themes from the research process

- Widespread stakeholder engagement played a crucial role in developing the Regional Strategic Tourism Plan, with input gathered through various methods such as interviews, surveys and focus groups.
- Key themes that emerged from the engagement process include the recognition that continuously improving the visitor experience through new tourism product development and amplifying promotion of the Central Valley's offerings is crucial for the success of the region. Themes will be further explored in the Regional Opportunities section of this plan.
- JLL's tourism readiness **index** classifies the Central Valley as an "emerging performer" — with increasing tourism interest and activity and ongoing infrastructure improvements and developments in the region.
- As an emerging performer, the Central Valley should prioritize actively investing in visitor infrastructure and attractions to capitalize on the growing tourism demand in California.
- The Central Valley demand driver scorecard process assessed 108 attractions and experiences across the region. An investment prioritization approach based on the results of the scorecard should be put into motion during the first year of plan implementation.
- The Central Valley event matrix process inventoried and scored 26 events across the region. The process indicated that many of the events in the region (69%) are "must see" if in the area.
- The event matrix analysis identified six unique events in the Central Valley that are positioned to be targeted regional draws — attracting overnight visitors regionally and contributing to other tourism sectors, such as hospitality.

Throughout the planning process, JLL also conducted an in-depth review of research and data provided by Visit California. Below is a summary of the findings for the Central Valley region.

Berryessa Gap Winery, Winters

Wat Dhammararam Buddhist Temple, Stockton

The Economic Impact of Travel

(Dean Runyan Associates, 2023)

This report provides a comprehensive analysis of the economic effects of travel on California's state economy. It addresses various key metrics such as travel spending, earnings, employment and tax receipts, broken down by county and tourism regions. The data below is based on estimates and research conducted by Dean Runyan Associates for Visit California.

In summary, in 2023, the Central Valley saw total travel spending reach $8.2 billion, marking 0.2% growth from the previous year. Visitor spending accounted for $7.6 billion, while additional travel-related expenditures added about $600 million. This upward trend reflects strong recovery and robust growth post pandemic, highlighting the county's attractiveness and resilience as a travel destination within the state.

The economic contributions of travel in the Central Valley were significant. Employment within the travel industry grew by 3.6%, providing 82,300 jobs for the region. Direct travel-generated earnings increased by 8.0% to $3.1 billion, with key sectors such as visitor air, accommodations and food service, and arts and entertainment showing substantial growth.

Visit California Community Sentiment Study

(Future Partners, 2023)

The Visit California Community Sentiment Study provides detailed findings and insights from various regions, including demographic data and the perceptions of residents regarding tourism. It explores both the benefits and strains of tourism on local communities and regions, highlighting aspects such as economic opportunities, traffic congestion and quality of life impacts. Specifically, the Central Valley is examined in terms of its residents' views on tourism's economic contributions, the challenges it creates and overall community sentiment.

Key findings for the Central Valley include residents' appreciation for tourism's role in boosting the community's image (66%), playing a key role in supporting hotels and resorts (63%), and job creation for locals (60%). About half of respondents find that the benefits from tourism outweigh problems in both the local communities (50%) and the region overall (53%). Respondents highlighted traffic and congestion (68%), trash (65%) and crowding (54%) as the main challenges created by visitors.

The Central Valley offers a variety of appreciated features, such as restaurant and dining options (79%), shopping districts (75%) and recreational/outdoor activities (69%). Popular tourist attractions include malls/outlets (26%), mountains (25%), and state or national parks (25%). While residents enjoy these amenities, certain attractions avoided by residents include casinos (15%) and theme/amusement parks (14%).

Residents see tourism as a neutral impact on their day-to-day life, with just over half of the residents agreeing that tourism's benefits outweigh its problems both locally and regionally. Concurrently, residents stated that the tourism industry enhances quality of life for individuals and their families, with 52% of locals deeming it helpful and important to the community's quality of life and 53% deeming it helpful for the region.

Strategically, the Central Valley should focus on balancing tourism's economic benefits with quality-of-life improvements. Addressing traffic, congestion and visitor/resident communication through infrastructure and policy changes could strengthen tourism's positive perception. A targeted campaign highlighting the symbiotic relationship between tourism and community well-being might also foster resident support.

Park Winters

The Central Valley regional opportunities

The Central Valley regional opportunities outline several key priorities and strategies to enhance the region's tourism industry and address critical challenges. These opportunities have been developed through comprehensive research, extensive stakeholder engagement and thorough analysis of the region's unique attributes. The opportunities span across various crucial aspects of tourism development, including tourism product development, tourism-related infrastructure and more.

Each opportunity area is accompanied by possible strategies designed to leverage the region's diverse assets, address existing challenges and position the region as a premier, sustainable destination for visitors. The following sections delve into these opportunities in detail, providing a comprehensive road map for stakeholders, DMOs and partners across the region to consider in the coming years. These strategies aim to foster a more integrated, sustainable and resilient tourism ecosystem that benefits both visitors and local communities while preserving the natural beauty and cultural heritage that makes the Central Valley region unique.

1 Invest in tourism product development

Agritourism

Agricultural tourism, or agritourism, consists of visitor-focused activities and experiences set within agricultural environments. The unique form of tourism allows visitors to immerse themselves in daily operations of farms and provides behind-the-scenes or hands-on opportunities to engage with various aspects of food production. Participants can partake in activities such as picking fruits and vegetables, observing food packing or production, feeding livestock, touring vineyards and even staying overnight in accommodations located in working farms. Additionally, agritourism often includes educational components in which visitors can learn about sustainable farming practices, the lifecycle of crops and the complexities of manufacturing and production.

California is a key player in the agriculture industry, with the Central Valley at the forefront. Although there are currently small-scale and local agritourism attractions in the area, there's a significant opportunity to expand and enhance agricultural tourism. By leveraging the fact that the Central Valley produces 25% of the nation's food supply, the region can be positioned as the leading agritourism destination in the country and globally.

Key partners

California Department of Food and Agriculture, California Farm Bureau Federation, University of California Agriculture and Natural Resources, Central Valley Tourism Association, Fresno County Office of Tourism, Visit Bakersfield, Visit Fairfield, Visit Fresno County, Visit Lodi, Visit Modesto, Visit Stockton, Visit Vacaville, Visit Visalia, Visit Yolo

Strategies

- Support the creation of a step-by-step "playbook" for family farms to create and run agritourism opportunities and leverage the **UC Sustainable Agriculture Research and Education Program's resources**. The playbook should include:
    - Training on business concepts (e.g., business planning, insurance, permits, taxes, bookkeeping, marketing and advertising)
    - Visitor accommodations and facility management awareness (e.g., facilities that meet ADA and health code requirements)
- Assist smaller producers with marketing efforts, including the promotion of local farmers markets, farm stands, tasting experiences and farm-to-table restaurant experiences to wider audiences.
- Utilize social media to capture younger generations who are more interested in "off the beaten path" agricultural attractions.
- Leverage the results from the **demand driver scorecard** to encourage the development of unique agritourism best-positioned to be developed into larger-scale attractions that draw statewide and/or national visitation to the Central Valley:
    - Almond blossom routes and tours
    - Experiences and tastings at local farms and producers, farmers markets, behind the scenes tours at "big ag" production facilities
    - Breweries, distilleries and farm-to-table restaurants
    - Lodi and Suisun Valley wine regions
- Develop relationships with family-run large commercial farm operators and agricultural manufacturers and share tourism-related data to understand the potential for incorporating agritourism opportunities into new developments and facilities being constructed.

The Annex Kitchen, Fresno

Events

The Central Valley region is a hub for tourism-related events that celebrate the area's agricultural heritage and cultural diversity. For example, the World Ag Expo in Tulare, the annual Taste the Arts Festival in Visalia and the year-round Davis Farmers Market are several events that draw visitors from across the region.

According to **JLL's event matrix** analysis, events in the Central Valley are often smaller in attendance, attracting audiences from nearby areas. The region has a unique opportunity to enhance its event programming by unifying its diverse metro areas with larger events that include multiple destinations by bolstering organizational resources. Additionally, there is potential for growth in hotel inventory, which could further expand the variety and attendance of events in the area.

Key partners

California Farm Bureau Federation, The Almond Board of California

Strategies

- Utilize JLL's **event matrix** analysis to determine opportunities for event growth and development in the region. Leverage the region's strengths and history — capitalize on agricultural happenings in the Central Valley (e.g., almond blossom season, grape harvests, crop-ripening events) and music genres (e.g., Bakersfield sound).
- Connect venue managers in the region to large event coordinators and promoters to discuss the Central Valley's venue capacities, upcoming availabilities, event calendars and event management strategies; provide networking opportunities to match event coordinators with potential viable and available venues.
- Recognize off-season event opportunities by analyzing visitation patterns in the metro areas of the Central Valley and identifying event ideas appealing to potential visitors during slower periods (e.g., water-based events during summer periods, blossom festivals during winter).
- Capture room nights in the Central Valley for events in other regions. Market hotels in Davis, Elk Grove and Woodland as viable lodging options during large events in Sacramento. Develop options and packages for eventgoers in other regions (i.e., Sacramento, Napa) to extend their visit with experiences in the Central Valley.
- Explore the idea of a regionwide event with tourism stakeholders and event organizers. The event could potentially be centered around agriculture, with each metro area holding a festival during a particular agricultural occurrence. The event could also be monthlong with specific destinations highlighted for crops in bloom or growing at coordinated times.
- Investigate the idea of a regionwide tasting event (e.g., restaurant experiences, wine or breweries). For example, a regionwide event could occur subsequent to the World Ag Expo in Tulare or Sacramento's Farm to Fork Festival, which attracts like-minded visitors from across the nation to the nearby area.

Caymus-Suisun Winery, Fairfield

Hotel/lodging inventory

Lodging infrastructure in the Central Valley is primarily limited-service product geared toward essential business travel and small conventions. An opportunity exists to develop additional full-service and upper upscale hotels in the region with the ability to serve larger conventions and upscale leisure travelers.

There are several successful adaptive reuse lodging properties throughout the Central Valley, where existing hotels and downtown buildings were converted into full service upper-upscale properties: the Hotel Winters in Winters, The Padre Hotel in Bakersfield, Wine & Roses Hotel in Lodi, and The Darling Hotel in Visalia. Leveraging these hotels as successful case studies could position the region to develop additional inventory.

Key partners

Leadership at Hotel Winters, The Padre Hotel, Wine & Roses Hotel, The Darling Hotel

Strategies

- Connect with current owners and developers of successful upper upscale and full-service convention hotels to understand best practices from development and adaptive reuse projects.
    - Encourage meetings/forums between local hotel developers, economic development agencies and relevant city/county jurisdictions in the Central Valley to advance new hotel construction and conduct significant renovations of existing hotel properties.
- Provide support to local small agricultural businesses (who may not be familiar with hospitality development) throughout the development process for upscale farm stays and/or “glamping” experiences.
- Develop alternative accommodations (e.g., farm stays, luxury “glamping” resorts and RV parks) and boutique small hotel properties (i.e., hotels under 10 rooms) throughout the region as lower construction cost lodging options.

Hotel Winters

2 Improve tourism-related transportation infrastructure

Public transportation

Given the large geographic footprint of the Central Valley, providing enhanced public transit and mobility options for visitors is a key priority, aligned with the **City of Fairfield General Plan, Circulation Element**. The ability to efficiently and comfortably transport visitors from the gateway cities of California throughout the major cities in the Central Valley and to/from major destinations in adjacent regions (e.g., the national parks, Lake Tahoe) would likely bring increased visitation to the Central Valley.

Efficient public transportation could entice visitors to extend trips/lengths of stay and spend additional tourism dollars within the region. Furthermore, enhanced public transportation may serve to attract additional conventions, meetings and events to the Central Valley as attendees could travel to/from events without the use of a car.

Key partners

Yosemite Area Rapid Transit (YARTS), Sequoia Shuttle, California High Speed Rail, Amtrak

Strategies

- Provide available tourism data to local, regional and state transit agencies such as Amtrak, California High Speed Rail, Fresno's FAX, Bakersfield's GET, Kern Transit, StanRTA, San Joaquin RTD and Yolobus.
    - Data can enable public transit decision making with visitors and the tourism workforce in mind and encourage the development of transit options between California gateway cities and the Central Valley and within the Central Valley's cities and destinations.
- Discuss the viability of creating a cross-region wine tour (positioned to value-oriented visitors who may be priced out of staying in the Napa region) with tourism stakeholders in the Napa Valley region. Visitors stay in the Central Valley (Winters, Fairfield) and ride transportation to taste wine in Yolo County, the Suisun Valley and Napa Valley.
- Discuss the organization of agritourism-focused tours with tourism stakeholders in the Los Angeles and Bay Areas, whereby transit runs from the gateway cities to agricultural attractions in the Central Valley for visitors to experience harvest celebrations, tastings, behind-the-scenes food manufacturing tours and local farmers markets and fruit stands.
- Explore avenues to incorporate public art and landscaping to beautify the region's highways, bridges and other transportation infrastructure.

Air travel

Fresno Yosemite International Airport (FAT), located in Fresno, is currently the primary gateway for air travel in the Central Valley. Although FAT currently facilitates a few direct flight options from a few gateway cities and airports on the West Coast, the primary means for national and international travelers to arrive in the Central Valley is to connect through larger airports such as SFO and LAX.

FAT has the opportunity to expand its services and infrastructure to accommodate growth in flight options, as detailed in the **FATforward Expansion Plan**. Efforts should continue to be focused on data analysis to determine key improvements and market expansions to bolster FAT as a major transportation hub for visitors to the Central Valley.

Key partners

Fresno Airport Administration, Central Valley Tourism Association, Fresno County Office of Tourism, Visit Bakersfield, Visit Fairfield, Visit Fresno County, Visit Lodi, Visit Modesto, Visit Stockton, Visit Vacaville, Visit Visalia, Visit Yolo

Strategies

- Provide tourism data to the Fresno airport administration and major airlines flying into FAT to identify opportunities and understand challenges in growing overnight visitation to the region via additional airlift.
- Enhance marketing and messaging efforts for the Fresno airport to international and national visitors flying to visit Yosemite, Sequoia and Kings Canyon. Specifically, emphasize the Fresno airport as a convenient gateway to the national parks, with local accommodations, car rentals and easy public transportation (Sequoia Shuttle and YARTS) during peak periods.
- Continue to monitor FAT's current expansion plan and the construction of visitor-friendly infrastructure at the airport to emphasize in regional marketing materials.

Fresno Chaffee Zoo, Fresno

3 Enhance regional marketing and messaging

As the Central Valley is made up of several diverse metro areas, the importance of creating a unified, cohesive brand for the region is paramount. For example, the Central Valley has the opportunity to be the agritourism capital of the United States when tourism product development is coupled with an amplified cohesive brand and strategic marketing and messaging of the region.

Key partners

Discover the Sequoias, Central Valley Tourism Association, Fresno County Office of Tourism, Visit Bakersfield, Visit Fairfield, Visit Fresno County, Visit Lodi, Visit Modesto, Visit Stockton, Visit Vacaville, Visit Visalia, Visit Yolo

Strategies

- Discuss a agriculture-related brand and tagline for the Central Valley. The brand should emphasize the quality and diversity of farm and food experiences available, as aligned with the **City of Fairfield General Plan, Economic Development Element**. Unified branding should complement each individual DMO's branding and campaigns for their respective metro areas.
- Once created, designed and agreed upon, incorporate the regional branding into external marketing and messaging produced throughout the region.
- Organize familiarization trips to local farms, enabling tourism industry professionals to experience firsthand agricultural operations and establish connections with restaurants and suppliers.
- Establish certificate programs and/or continuing education programs to enhance the skills and knowledge of the current and future workforce in tourism and hospitality.
- Identify potentially missed or underserved geographic regions for outreach with available marketing dollars. Conduct measurable campaigns and continuously evaluate performance; identify areas of significant positive or poor return on investment.
- Explore opportunities to create and market a regionwide tourism itinerary centered around agritourism.
    - The itinerary could potentially include curated agricultural destinations such as vineyards, farmers markets, farm stands, breweries and other agricultural products (e.g., olive oil). The itinerary could include hotel accommodations in unique areas (historic downtowns, wine country).
- Consider an interactive "Central Valley Passport" for visitors to check off farm tours, farmers markets, vineyards, breweries and other agriculture and culinary experiences.
- Provide materials, familiarization trips and communications to the international offices of Visit California to emphasize unique and agricultural-focused tourism demand drivers and events in the Central Valley.

Conclusion

The Central Valley Regional Opportunities initiative marks a crucial milestone in our collective effort to bolster and sustain the area's tourism industry. This comprehensive report, built on extensive stakeholder input, rigorous research and strategic analysis, aims to guide the region towards a more vibrant, sustainable and economically prosperous future.

This endeavor has been defined by dedication, innovation and a shared vision among diverse stakeholders. Inputs from various entities, including DMOs, economic development agencies, arts councils, cultural organizations, attraction operators, transportation authorities, airport officials, hospitality providers, sustainability groups and others have shaped a plan that is both ambitious and achievable.

Our strategy centers on three key priorities: tourism product development, tourism-related infrastructure and enhanced marketing and messaging. Each priority is supported by concrete opportunities and strategies, ensuring the plan's practicality alongside its aspirational nature.

While challenges lie ahead, the potential for growth, innovation and positive change is substantial. By adhering to the region's vision and values, the Central Valley can exceed expectations and set a new standard for sustainable tourism development.

The project team extends their sincere gratitude to everyone who dedicated their time, insights and enthusiasm to this initiative. Your participation has been vital in crafting strategies that genuinely represent the needs and aspirations of the Central Valley region.

Appendix

Regional advisory committee members

JLL extends its heartfelt appreciation to the entire Visit California team, the dedicated members of the regional advisory committee, as well as the stakeholders and partners across the community who actively participated in the regional strategic tourism planning process for the Central Valley region. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Todd Aaronson	Visit Modesto
Octavio Escobedo III	Tejon Indian Tribe
Corinne Martinez	Berryessa Gap Winery, L'Apero les Trois
Jason Perry	Adventist Health Arena
Terry Selk	Visit Yolo
Wes Rhea	Visit Lodi, Visit Stockton
Lisa Oliveira	Visit Fresno County
Vanessa Puopolo	Visit Fresno County
Suzanne Bianco	Visit Visalia
Sherrie Bakke	Visit Visalia
Stuart Spencer	Lodi Winegrape Commission
Suzanne Devereaux	Harris Ranch Resort
Anand Patel	Visit Fairfield
John Jamison	Jelly Belly Candy Company
Amina Harris	Z Specialty Food, UC Davis Honey and Pollination Center
Anil Chagan	Infinite Hospitality
Carrie Groover	Visalia Marriott at the Convention Center
Michael Seaward	The Darling Hotel
Matt Billingsley	Visit Bakersfield
Tyeann Borskey	Visit Bakersfield
Megan Simpson	Visit Bakersfield
David Lyman	Visit Bakersfield

Engaged destination marketing organizations and convention and visitors bureaus

JLL extends its sincere thanks to the destination marketing organizations and convention and visitors bureaus whose partnership and expertise were essential to the success of this project. Their insights into local tourism landscapes and their commitment to collaboration were invaluable.

Organization
Central Valley Tourism Association
Fresno County Office of Tourism
Visit Bakersfield
Visit Fresno County
Visit Modesto
Visit Visalia
Visit Yolo
Visit Vacaville
Visit Fairfield
Visit Lodi
Visit Stockton

Waterfront, Stockton

Destination plans review database

A review of the following existing regional plans was conducted to establish context and identify key priorities and available resources for this project:

City/County	Name of plan
Fresno	City of Fresno General Plan
Bakersfield	City of Bakersfield Climate Action Plan
Stockton	Sustainable Neighborhood Plan
Modesto	Groundwater Sustainability Plan
Visalia	Climate Action Plan
Clovis	City of Clovis General Plan
Tracy	Sustainability Action Plan
Merced	Merced Vision 2030 General Plan
Merced	Climate Action Plan
Manteca	Manteca General Plan Update
Turlock	Turlock General Plan
Yuba City	City of Yuba City General Plan
Tulare	City of Tulare Climate Action Plan
Tulare	City of Tulare General Plan
Davis	Climate Action & Adaptation Plan
Madera	City of Madera - Climate Action Plan
Lodi	Climate Action Plan
Woodland	2035 Climate Action Plan
Hanford	Final Regional Climate Action Plan
West Sacramento	Climate Action Plan
Delano	2021-2022 Strategic Plan
Ceres	City Of Ceres 2020 Urban Water Management Plan
Ceres	Ceres General Plan 2035
Los Banos	Los Banos General Plan 2042
Atwater	Final 2020 Urban Water Management-Plan
Atwater	City of Atwater General Plan
Lathrop	General Plan Update
Wasco	City of Wasco General Plan Update 2040 General Plan
Lemoore	City of Lemoore 2030 General Plan
Sanger	Sanger 2035 General Plan Update And North Academy Corridor Master Plan
Reedley	Climate Action Plan
Riverbank	City of Riverbank General Plan

Destination plans review database (cont.)

City/County	Name of plan
Selma	Selma General Plan Update
Dinuba	Dinuba General Plan Update
Patterson	City of Patterson General Plan
Oakdale	Generation Green Sustainability Plan
Corcoran	General Plan 2025
Shafter	City of Shafter General Plan
Arvin	City of Arvin General Plan Update
Coalinga	City of Coalinga General Plan 2005 - 2025
Ripon	General Plan 2040
Kerman	City of Kerman 2040 General Plan
Parlier	City of Parlier Traffic Calming & Safety Enhancement Plan
McFarland	City of McFarland – Economic Strategic Plan
McFarland	City of McFarland 2040 General Plan (Final)
Livingston	2020 Urban Water Management Plan
Livingston	Livingston General Plan 2040
Livingston	City of Livingston Organizational Strategic Plan 2019-2024
Avenal	Final Regional Climate Action Plan
Tehachapi	General Plan Update
Lindsay	Comprehensive General Plan
Mendota	General Plan Update 2005-2025
Kingsburg	2018-2023 Strategic Plan
Newman	Newman 2030 General Plan
Farmersville	Farmersville General Plan Update
Exeter	Net Zero Exeter 2030 Plan
Live Oak	City of Live Oak 2030 General Plan
Waterford	City of Waterford General Plan Update Vision 2025
Taft	2017 Climate Action Plan
Taft	City of Taft General Plan
Orland	City of Orland General Plan
Firebaugh	2030 Firebaugh General Plan
Escalon	Escalon General Plan
Woodlake	Woodlake General Plan
Hughson	Hughson General Plan
Winters	General Plan/Policy Document

Destination plans review database (cont.)

City/County	Name of plan
Fowler	2025 General Plan
Colusa	The County of Colusa General Plan
Huron	Take Action For Sustainable Huron - Sustainability Plan
Willows	General Plan
Gustine	General Plan
Dos Palos	Dos Palos General Plan
Williams	Environmental Impact Report
San Joaquin	General Plan Policy Document
Wheatland	Climate Action Plan
Maricopa	Planning Maricopa
Fairfield	City of Fairfield General Plan
Vacaville	Vacaville General Plan
Suisun City	City of Suisun City 2035 General Plan
Dixon	General Plan 2040
Rio Vista	Rio Vista 2045

Focus group attendees

JLL extends its sincere gratitude to all the focus group participants whose valuable insights and contributions were essential to the development of this plan. Your time and expertise are deeply appreciated.

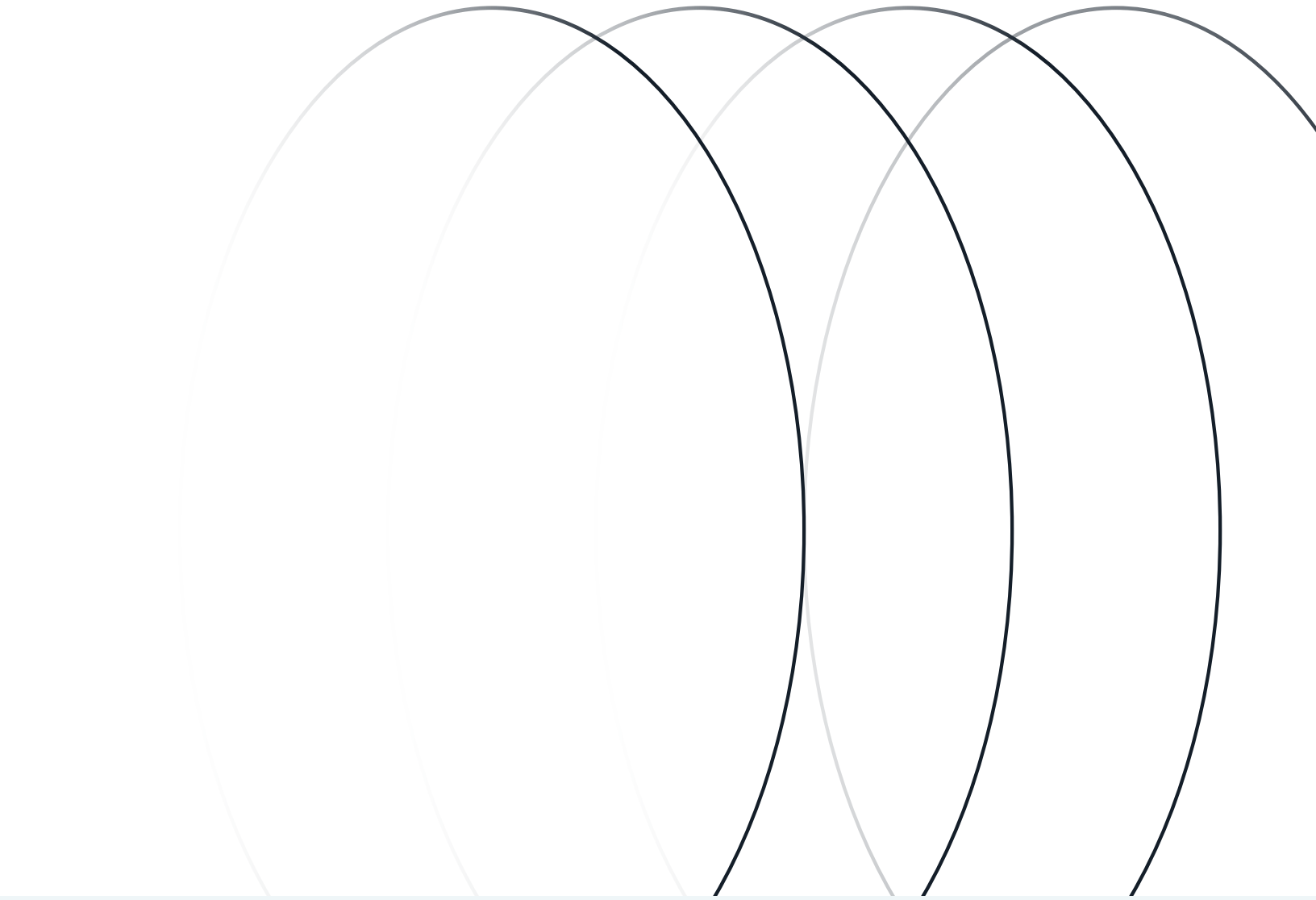
Name	Organization
Guysell D. Geter Sr.	Hotel Winters
Carrie Groover	Visalia Marriott at the Convention Center
Jennifer Johnson	The Padre Hotel
Russ Munson	Wine & Roses Hotel
Tony Zilobaf	Bakersfield Marriott at the Convention Center
Robert Stair	DoubleTree by Hilton Hotel Fresno Convention Center
Paula Flores	Hotel Piccadilly
Paula Rowland	Hyatt Place UC Davis
Brad Reynolds	Harris Ranch Resort
Suzanne Devereaux	Harris Ranch Resort
Taren Thandi	Axis Hotel Group
Stephanie Rodriguez	Hampton Inn & Suites Clovis
Rhona Miles	University Plaza Waterfront Hotel
Kerwin Garcia	Courtyard Stockton
Anna Maria Carter	Great Wolf Lodge
Corrinne Martinez	Berryessa Gap Winery, L'Apero les Trois
Stuart Spencer	Lodi Winegrape Commission
Heather Panella	Oak Farm Vineyards
Elizabeth Laval	Fresno Historical Society
David Lucas	The Lucas Winery
Ann and Mark Sievers	Il Fiorello Olive Oil Company
Jody Anselmo	BackRoad Vines
Carolyn West	Rock Creek Vineyard
Jorja Lerner	Harney Lane Vineyards
Teri Lawrence	Viaggio Estate & Winery
Ann and Luke Bryant	Lodi Wine Trolley
Jennifer Sobieralski	Fresno State Winery
Bret Engelman	Engelmann Cellars
Ryan Jacobsen	Fresno County Farm Bureau
Jackie Grazier	The Sun-Maid Market
Jennifer Barber	Enzo’s Table
John Jamison	Jelly Belly Candy Company
Amy Thompson	Macerich/Vintage Faire Mall
Jonathan Van Ryn	Bravo Farms
Kyle Jensen	Hilmar Cheese Company

Focus group attendees (cont.)

Name	Organization
Linda Granzella	Granzella's Restaurant
Jenifer Natto	Outlets at Tejon
Hattie Butler	Putah Creek Café
Nic West	Roberts Ferry Gourmet
Camille DiRocco	Macerich/Vintage Faire Mall
Michael Cruz	Tioga-Sequoia Brewing Company
Julie Coldani	Calivines Winery & Olive Mill
Katie Drebert	Lincoln Center Shops Stockton
Kao Nou Yang	City of Soledad, City of Avenal
Barbara Harb	City of Manteca, Economic Development
Julian Ramos	Fresno County Economic Development Corporation
Will Oliver	Fresno County Economic Development Corporation
Lena Legge	Governor's Office of Business and Economic Development
Julie Herd	Governor's Office of Business and Economic Development
Lillian Conroe	Governor's Office of Business and Economic Development
Danna Stroud	Governor's Office of Business and Economic Development
Rhonda Nelson	Port of Stockton
Sylvester Aguilar	Port of Stockton
Timm Quinn	Greater Stockton Chamber of Commerce
Fernando Gapasin	Greater Stockton Chamber of Commerce
Jenna Haley	Lodi Chamber of Commerce
Cory Koehler	Davis Chamber of Commerce
Shawn Miller	City of Clovis Economic Development
Richard Chapman	Kern Economic Development Corporation
Trish Christensen	Modesto Chamber of Commerce
Carrie Wright	City of Stockton, Office of Economic Development
Greg Newman	Clovis Chamber of Commerce
Lance Lippincott	City of Shafter, City of Fresno, Economic Development
Kami Gonzalez	Greater Bakersfield Chamber of Commerce
Elliott Balch	Downtown Fresno Partnership
Michael Huber	Downtown Stockton Alliance
Rick Sokol	Stockton Airport
David Lipari	San Joaquin Joint Powers Authority
Jason Perry	Adventist Health Arena
Kirk Smith	Six Flags Discovery Kingdom
Jon Forrest Dohlin	Fresno Chaffee Zoo
Michael Olcott	Kern County Fair
Amanda Zimmerman	Haggin Museum

Focus group attendees (cont.)

Name	Organization
Susan Obert	Haggin Museum
Doug Hosner	Gallo Center for the Arts
Steve Eckerson	Mechanics Bank Arena, Theater and Convention Center
Jeff Wolff	Fresno Convention & Entertainment Center
Shera Franzman	Forestiere Underground Gardens
Tim Cohee	China Peak Mountain Resort
Daniel Castillo	San Joaquin County Fairgrounds



Stakeholder interviewees

JLL expresses its sincere thanks to stakeholders and interviewees for their collaborative spirit and willingness to share their knowledge. Their partnership was invaluable in achieving the goals of this project.

Name	Organization
Stuart Spencer	Lodi Winegrape Commission
Jon Forrest Dohlin	Fresno Chaffee Zoo
Steven Gonzales-Warkentin	Fresno Chaffee Zoo
Kailey Young	Forestiere Underground Gardens
Emily Valdez	Fresno Chaffee Zoo
Melissa Goodfellow	Hilmar Cheese Company
Tasting room manager	Berryessa Gap Winery - Downtown Tasting Room
John Jamison	Jelly Belly Candy Company
Matt Billingsley	Visit Bakersfield
Nancy Beckman	Visit Lodi
Anand Patel	Visit Fairfield
Todd Aaronson	Visit Modesto
Lisa Olivera	Visit Fresno County
Terry Selk	Visit Yolo
Suzanne Bianco	Visit Visalia
Wes Rhea	Visit Stockton
Melyssa Reeves	Visit Vacaville
Sherrie Bakke	Visit Visalia
David Lyman	Visit Bakersfield
Evangelina Medina	Visit Bakersfield
Anthony Silva	Visit Modesto
Lee Ann Eager	Fresno Economic Development Council
Julian Ramos	Fresno Economic Development Council
Aaron Collins	Sequoia Riverlands Trust
Kao Nou Yang	City of Soledad, City of Avenal
Octavio Escobedo III	Tejon Indian Tribe
Amina Harris	Z Specialty Food, UC Davis Honey and Pollination Center
Ann Veneman	United States Secretary of Agriculture, Emeritus
Blake Roberts	Sacramento-San Joaquin Delta National Heritage Area
Guysell D. Geter Sr.	Hotel Winters
Carrie Groover	Visalia Marriott at the Convention Center
Jennifer Johnson	The Padre Hotel

Stakeholder interviewees (cont.)

Name	Organization
Russ Munson	Wine & Roses Hotel
Tony Zilobaf	Bakersfield Marriott at the Convention Center
Robert Stair	DoubleTree by Hilton Hotel Fresno Convention Center
Paula Flores	Hotel Piccadilly
Paula Rowland	Hyatt Place UC Davis
Brad Reynolds	Harris Ranch Resort
Suzanne Devereaux	Harris Ranch Resort
Taren Thandi	Axis Hotel Group
Stephanie Rodriguez	Hampton Inn & Suites Clovis
Rhona Miles	University Plaza Waterfront Hotel, Stockton
Kerwin Garcia	Courtyard Stockton
Anna Maria Carter	Great Wolf Lodge
Corrinne Martinez	Berryessa Gap Winery, L'Apero les Trois
Stuart Spencer	Lodi Winegrape Commission
Heather Panella	Oak Farm Vineyards
Elizabeth Laval	Fresno Historical Society
David Lucas	The Lucas Winery
Ann and Mark Sievers	Il Fiorello Olive Oil Company
Jody Anselmo	BackRoad Vines
Carolyn West	Rock Creek Vineyard
Jorja Lerner	Harney Lane Vineyards
Teri Lawrence	Viaggio Estate & Winery
Ann and Luke Bryant	Lodi Wine Trolley
Jennifer Sobieralski	Fresno State Winery
Bret Engelman	Engelmann Cellars
Ryan Jacobsen	Fresno County Farm Bureau
Jackie Grazier	The Sun-Maid Market
Jennifer Barber	Enzo's Table
John Jamison	Jelly Belly Candy Company
Amy Thompson	Macerich/Vintage Faire Mall
Jonathan Van Ryn	Bravo Farms
Kyle Jensen	Hilmar Cheese Company
Linda Granzella	Granzella's Restaurant
Jenifer Natto	Outlets at Tejon
Hattie Butler	Putah Creek Café
Nic West	Roberts Ferry Gourmet
Camille DiRocco	Macerich/Vintage Faire Mall

Stakeholder interviewees (cont.)

Name	Organization
Michael Cruz	Tioga-Sequoia Brewing Company
Julie Coldani	Calivines Winery & Olive Mill
Katie Drebert	Lincoln Center Shops Stockton
Kao Nou Yang	City of Soledad, City of Avenal
Barbara Harb	City of Manteca, Economic Development
Julian Ramos	Fresno County Economic Development Corporation
Will Oliver	Fresno County Economic Development Corporation
Lena Legge	Governor's Office of Business and Economic Development
Julie Herd	Governor's Office of Business and Economic Development
Lillian Conroe	Governor's Office of Business and Economic Development
Danna Stroud	Governor's Office of Business and Economic Development
Rhonda Nelson	Port of Stockton
Sylvester Aguilar	Port of Stockton
Timm Quinn	Greater Stockton Chamber of Commerce
Fernando Gapasin	Greater Stockton Chamber of Commerce
Jenna Haley	Lodi Chamber of Commerce
Cory Koehler	Davis Chamber of Commerce
Shawn Miller	City of Clovis Economic Development
Richard Chapman	Kern Economic Development Corporation
Trish Christensen	Modesto Chamber of Commerce
Carrie Wright	City of Stockton, Office of Economic Development
Greg Newman	Clovis Chamber of Commerce
Lance Lippincott	City of Fresno, Economic Development
Kami Gonzalez	Greater Bakersfield Chamber of Commerce
Elliott Balch	Downtown Fresno Partnership
Michael Huber	Downtown Stockton Alliance
Rick Sokol	Stockton Airport
David Lipari	San Joaquin Joint Powers Authority
Jason Perry	Adventist Health Arena
Kirk Smith	Six Flags Discovery Kingdom
Jon Dohlin	Fresno Chaffee Zoo
Michael Olcott	Kern County Fair
Amanda Zimmerman	Haggin Museum
Susan Obert	Haggin Museum
Doug Hosner	Gallo Center for the Arts
Steve Eckerson	Mechanics Bank Arena, Theater and Convention Center
Jeff Wolff	Fresno Convention & Entertainment Center

Stakeholder interviewees (cont.)

Name	Organization
Shera Franzman	Forestiere Underground Gardens
Tim Cohee	China Peak Mountain Resort
Daniel Castillo	San Joaquin County Fairgrounds
Cesar Lucio	Central Valley Community Foundation, F3 Innovate
Carla Fresquez	UC Davis
Alex Karolyi	River Partners
Rachael Callahan	University of California Agriculture and Natural Resources
Sarah Masterson	The VINE
Casey Jardine	U.S. Forest Service, Stanislaus National Forest
Jonathan George	U.S. Forest Service, Sierra National Forest
Joe Tyler	CAL FIRE
Karen Ross	California Department of Food and Agriculture

Visited points of interest

The following points of interest were visited to gather firsthand information and context for this project:

Point of interest	Location
Route 99	Lebec to Sacramento
Tejon Ranch/Petro Travel Center	Lebec
Outlets at Tejon	Arvin
Bakersfield Marriott at the Convention Center	Bakersfield
Mechanics Bank Arena, Theater and Convention Center	Bakersfield
Visit Bakersfield	Bakersfield
Salty's BBQ & Catering	Bakersfield
Rosemary's Family Creamery	Bakersfield
Buck Owens' Crystal Palace	Bakersfield
The Bakersfield Sign	Bakersfield
Kern County Museum	Bakersfield
Amtrak Station, Bakersfield	Bakersfield
Mill Creek Park	Bakersfield
Kern River Parkway	Bakersfield
Downtown Visalia	Visalia
Pita Kabob Downtown Gastropub	Visalia
Bravo Farms	Traver
Swedish Coffee Pot Water Tower & Park	Kingsburg
Sun-Maid World's Largest Box of Raisins	Kingsburg
The Sun-Maid Market	Kingsburg
DoubleTree by Hilton Hotel Fresno Convention Center	Fresno
Fresno Chaffee Zoo	Fresno
Roeding Park	Fresno
Fresno Convention & Entertainment Center	Fresno
Tioga-Sequoia Brewing Company	Fresno
Chukchansi Park	Fresno
Downtown Fresno	Fresno
Forestiere Underground Gardens	Fresno
Pismo's Coastal Grill	Fresno
Woodward Park	Fresno
Kuppa Joy Coffee	Fresno
Chukchansi Gold Resort & Casino	Fresno

Point of interest	Location
Tower District	Fresno
Visit Fresno County	Fresno
Hilmar Cheese Company	Hilmar
DoubleTree by Hilton Hotel Modesto	Modesto
Visit Modesto	Modesto
California Welcome Center	Modesto
Gallo Center for the Arts	Modesto
Modesto Arch	Modesto
Downtown Modesto	Modesto
Modesto Street Art	Modesto
Almond Blossom Cruise	Modesto
Sciabica's California Olive Oil	Modesto
Rodin Farms	Modesto
Visit Stockton	Stockton
Downtown Stockton	Stockton
University of the Pacific	Stockton
Port of Stockton	Stockton
Haggin Museum	Stockton
Adventist Health Arena	Stockton
Banner Island Ballpark/Stockton Ports	Stockton
University Plaza Waterfront Hotel	Stockton
Stockton Memorial Civic Auditorium	Stockton
Cast Iron Trading Co.	Stockton
Wine & Roses Hotel	Lodi
Lodi Lake	Lodi
Lodi Arch	Lodi
Downtown Lodi and winery tasting rooms	Lodi
Visit Fairfield	Fairfield
Jelly Belly Factory Tour	Fairfield
California Welcome Center	Fairfield
Caymus-Suisun Vineyards	Fairfield
Downtown Winters	Winters
Berryessa Gap Vineyards Downtown Tasting Room	Winters
Hotel Winters	Winters
Putah Creek Café	Winters
Rotary Park	Winters
Buckhorn Steakhouse	Winters

Global destinations' readiness for sustainable tourism

- Tourism readiness index is the product of a partnership between JLL and the World Travel & Tourism Council to assess global cities' tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC and JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety and security as well as the prioritization of tourism.
- Indeed, no two destinations are better or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

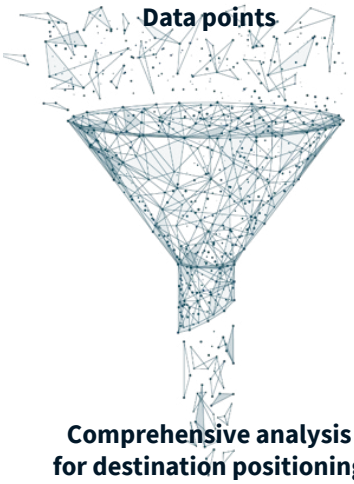
Tourism readiness index

- Comprehensive analysis addresses what makes a destination ready for sustainable travel and tourism
- Assess current positioning and ability to manage growth
- Indicators | 75 data points across all facets of the tourism economy
- Outcomes | eight categories and five destination typologies

Globally recognized tool validated by over 100 domestic and international destinations and the World Travel & Tourism Council

75

Data points



Comprehensive analysis for destination positioning

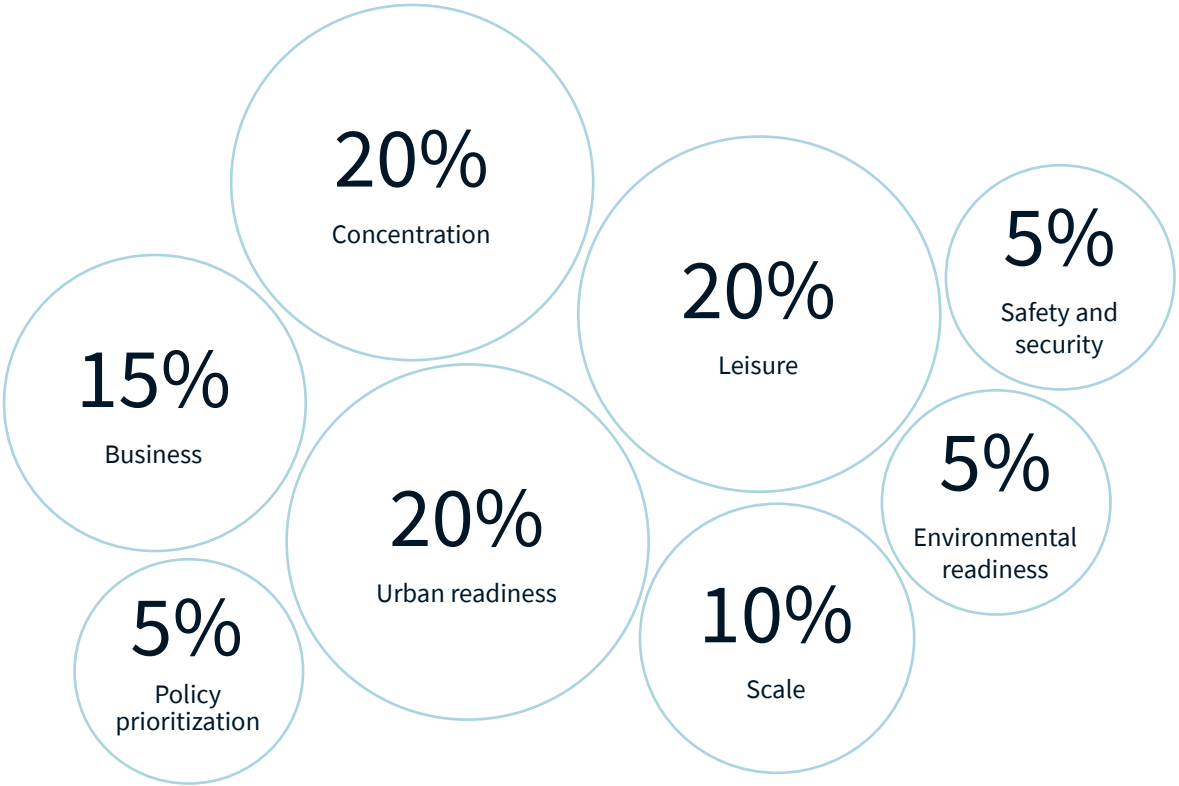
Tourism readiness index categories

1. Scale
2. Leisure
3. Environmental readiness
4. Safety and security
5. Concentration
6. Business
7. Urban readiness
8. Policy prioritization

Levels of readiness | Destination typologies

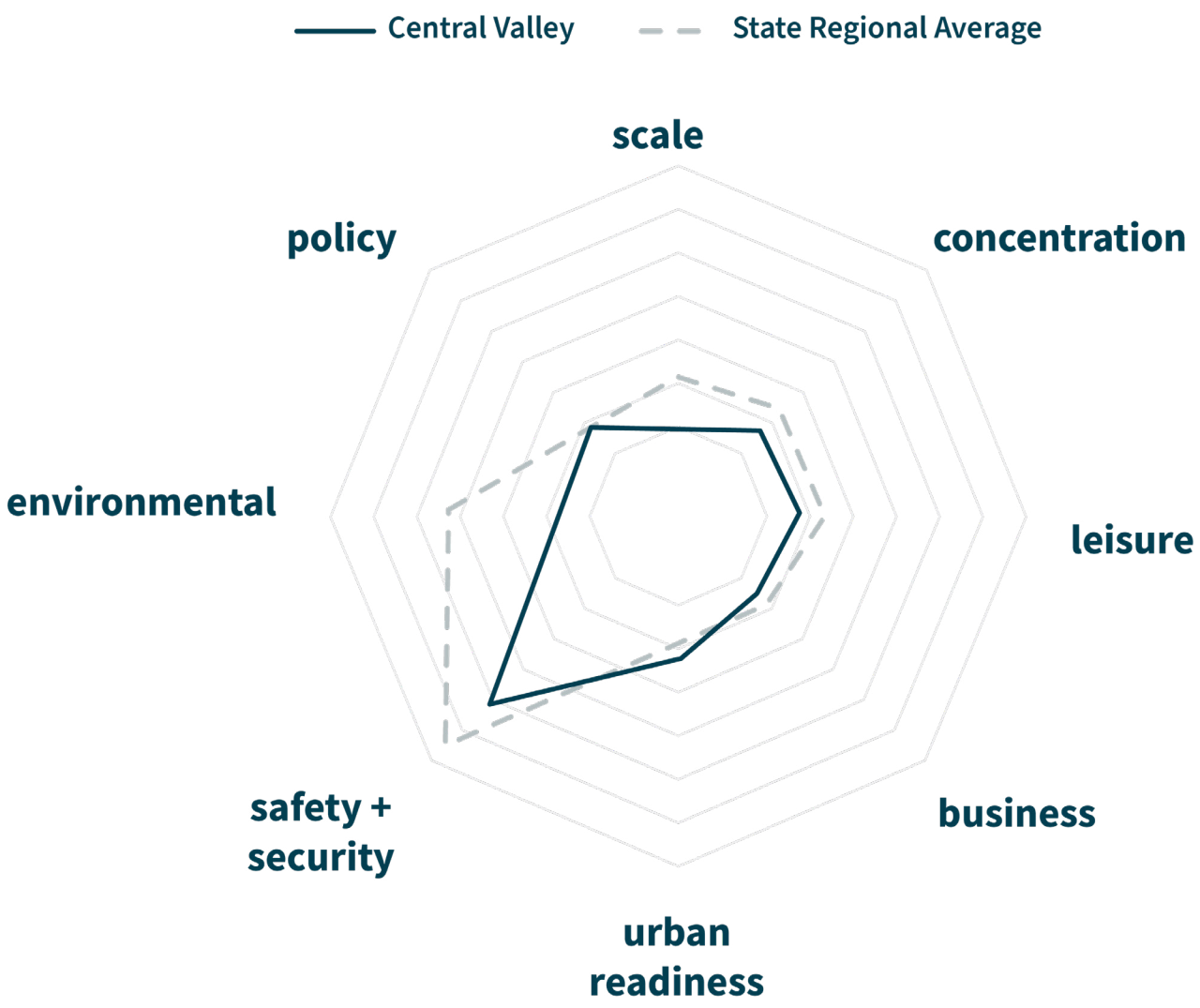
Dawning Developers	Emerging Performers	**Balanced Dynamics**	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth in business and leisure paces with scale	Established tourism infrastructure	Aging or strained tourism infrastructure
Opportunities ahead with planning	Opportunities for strategic development	Equalized scale and concentration	Proactively manage pressures and capacity building	Feeling the pressures of scale and concentration
	Smaller scale — may experience pressures			

Weights by category



The Central Valley results

Outcome by pillar



Demand driver scorecard

Process — multistep assessment of destination assets

Utilize visitor traffic and flow data to assess current demand

Place individual assets on scale based on eight criteria to score

Rate anything that is a 6-7 or greater as the region's attractors

Utilize the outcome to identify future competitive positioning

Recommend new investment or enhancement to grow assets on the scale

Score card elements

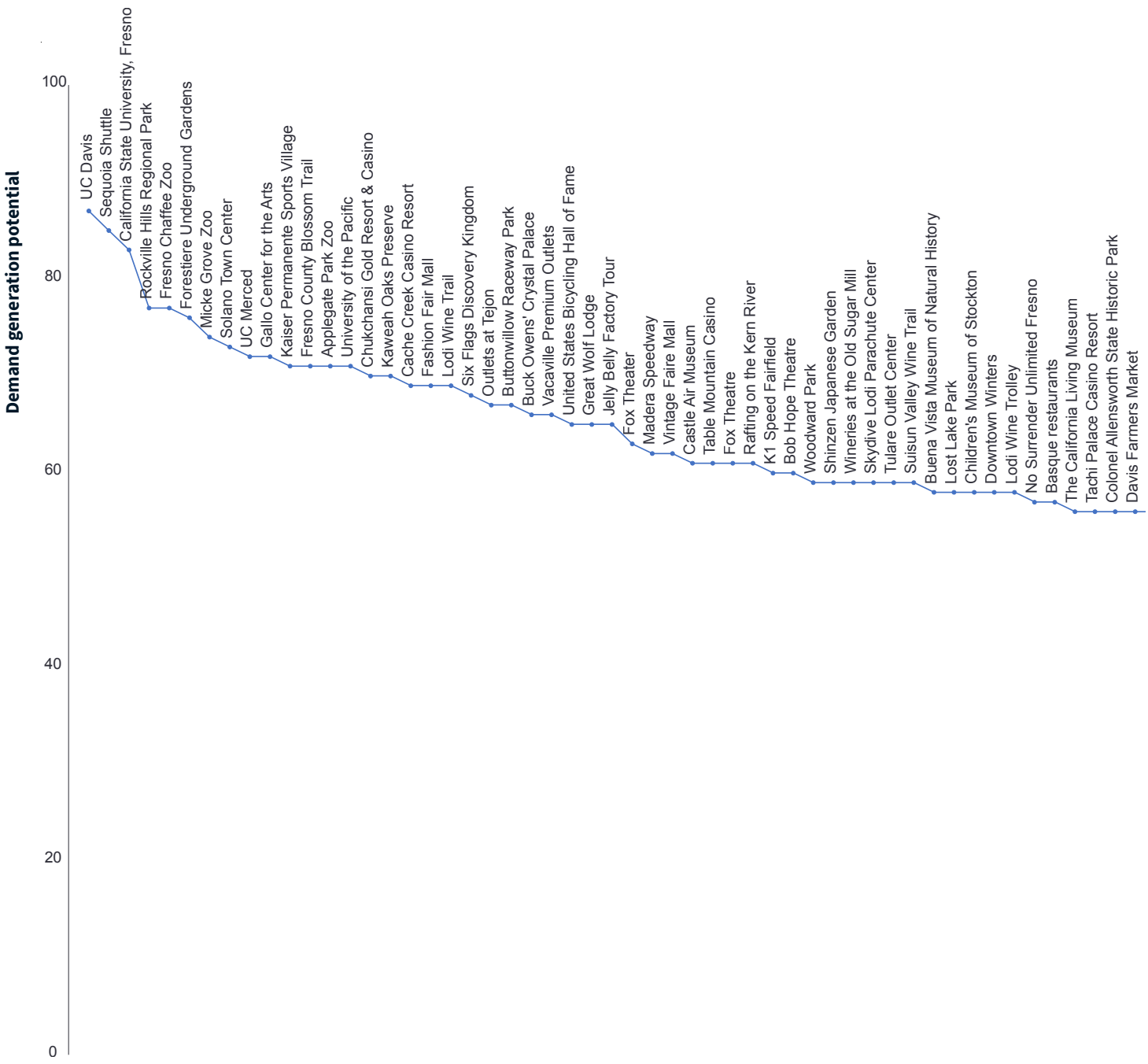
Item	Definition	Max point value
One of a kind	Captivating content or collections that drives interest and appeal Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy — trying to capture a moment)	20
Engaging visitor experience	Interaction between the guest and the attraction	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15
Event opportunities	Programming temporal, catalytic events	10
Venue capabilities	Easily transformed and adapted to host various functions	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5

Score card: Eiffel Tower sample scoring

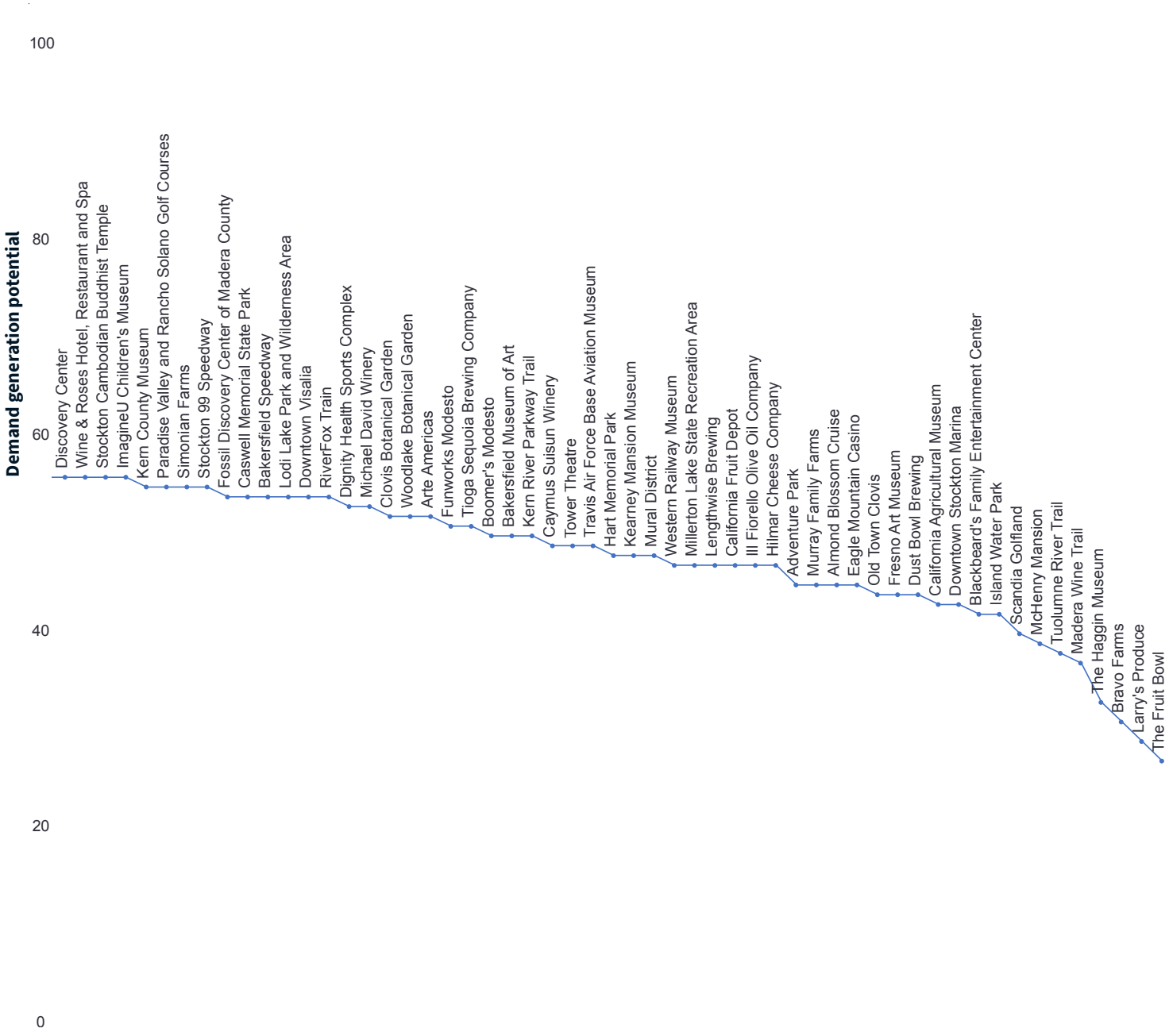
Item	Definition	Score	Max point value
One of a kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25	25
Iconic scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy—trying to capture a moment)	20	20
Engaging visitor experience	Interaction between the guest and the attraction	15	15
Current visitor demand	Level of visitor traffic, reviews, etc., to the asset currently	15	15
Event opportunities	Programming temporal, catalytic events	10	10
Venue capabilities	Easily transformed and adapted to host various functions	5	5
Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5	5
Future unique development	Upcoming additions or plan initiatives that elevate potential	5	5

Oak Farm Vineyards, Lodi

Central Valley demand drivers



Central Valley demand drivers



Event matrix

Purpose — Use criteria that drives event return to understand the current landscape of successful events and position the region to support up and coming events.

Identify key events serviced by the region

Rate events on matrix using 11 criteria

Identify those events that can grow in specific areas through matrix outcomes

Work with organizers on tactics for implementation

Program components

- Tourism promotion — destination impact
- Benefit to the destination brand
- Innovation — uniqueness
- Evidence of partnerships
- Organizational structure and management capability
- Economic impact (direct spending)
- Suitable target market(s)
- Comprehensive marketing plan/approach
- Overnight stays (room nights)
- Scale of project — future potential
- Time of year — need periods

Multi-day event

Each event is scored as a single instance, regardless of duration. The evaluation, across the 10 criteria, considers the event's overall impact and attendance. Instead of daily attendance, the Event Matrix uses criteria such as total overnight stays and the suitability of the event's target markets. The approach to determining overnight stays involves a two-stage analysis. The first stage uses methods tailored to each event's reporting sophistication, including reviewing event websites (for past statistics and future room block numbers), reported attendance on Destination Marketing Organization (DMO) websites, and public articles for high-profile events. In the second stage, DMO representatives and regional advisory committees qualitatively review these findings to provide feedback and revisions, validating the scoring process.

Risk

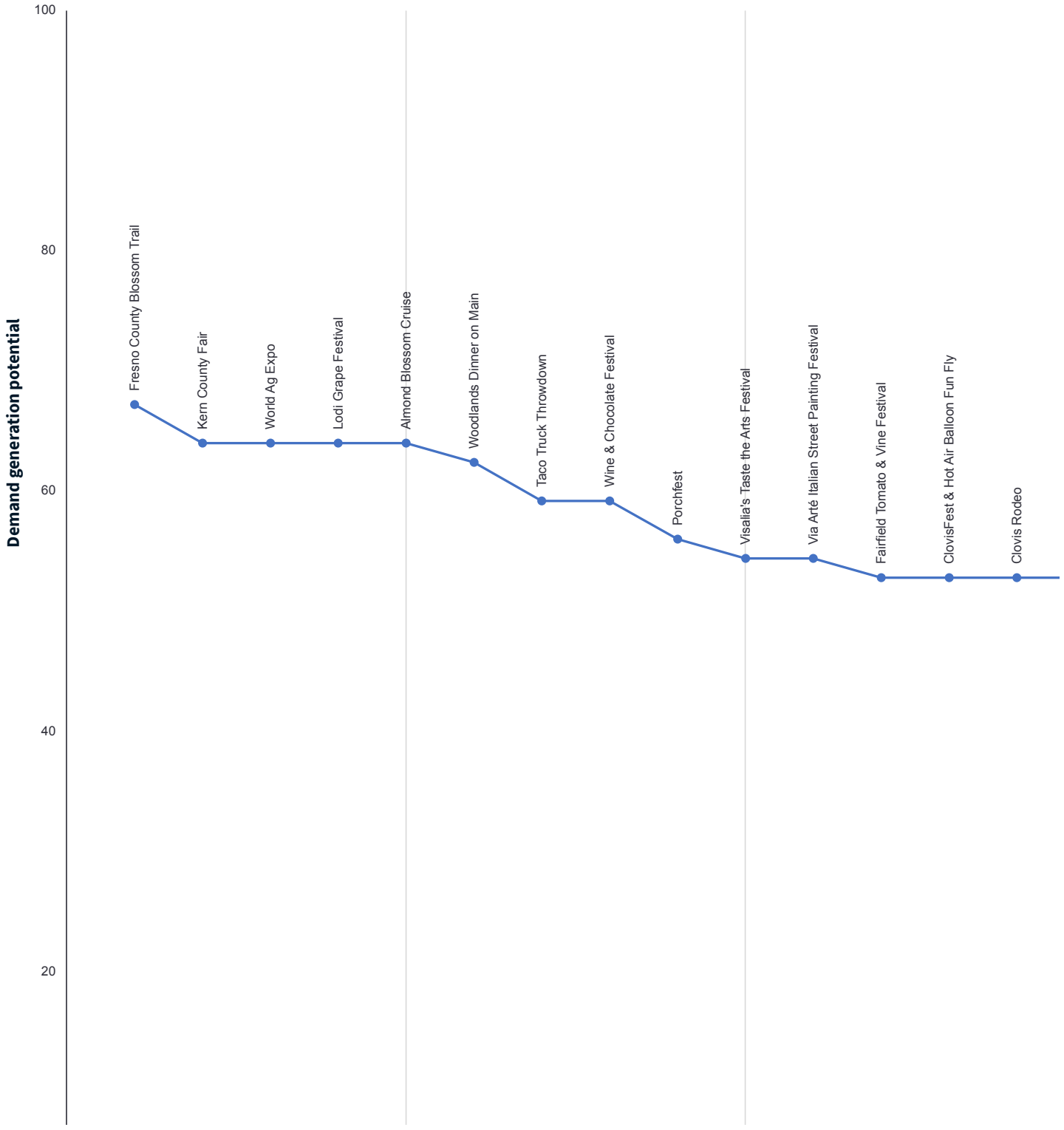
The Event Matrix tool does not directly incorporate event-related risks into final scores, as these considerations are outside its scope. However, stakeholder-identified regional risks, including public safety challenges and high liability insurance premiums due to climate-related risks have been addressed in regional plans and discussions.

Haggin Museum, Stockton

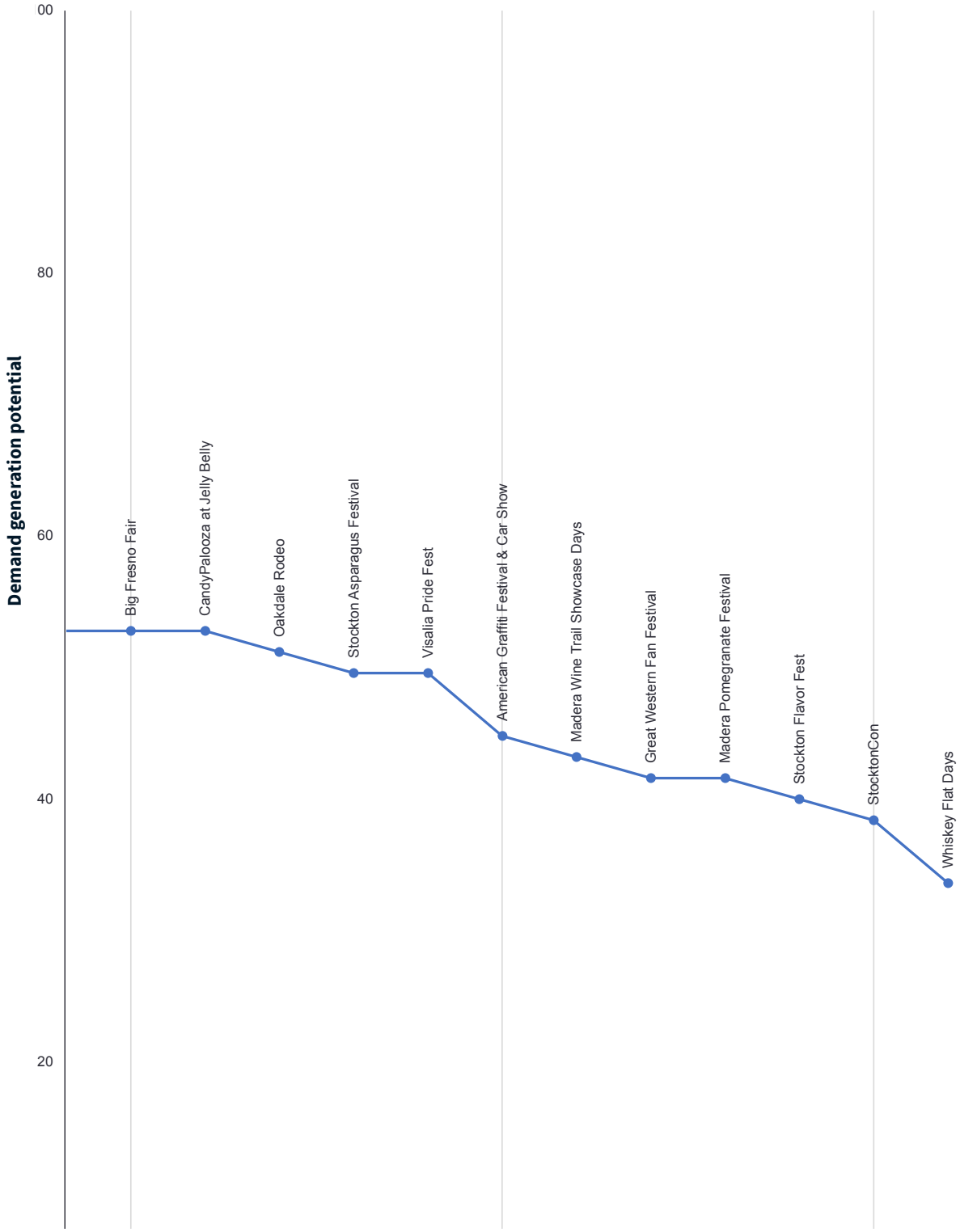
Program components

	Fail	Poor	Average	Above average	Excellent	Total points awarded
Program components						10
1. Tourism promotion — Destination impact						10
2. Benefit to the destination brand						10
3. Innovation — uniqueness						10
4. Evidence of partnerships						10
5. Organizational structure & management capability						10
6. Economic impact (Direct Spending)						10
7. Suitable target market(s)						10
8. Comprehensive marketing plan/ approach						10
9. Overnight stays (room nights)						10
10. Scale of project — future potential						10
*Bonus — need periods/time of the year						
Total Maximum possible points = 100						**100**

Central Valley leisure events



Central Valley leisure events



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